



Focus on Education

Host: Roy Cavanagh MBE

Panelists:

- Barry Cullen
- Christian Spence
- Jo Purves
- Mo Isap
- Pat Farrell
- Sean McGonigle

Setting the Scene

Christian Spence

Head of Research & Policy

Greater Manchester Chamber of Commerce

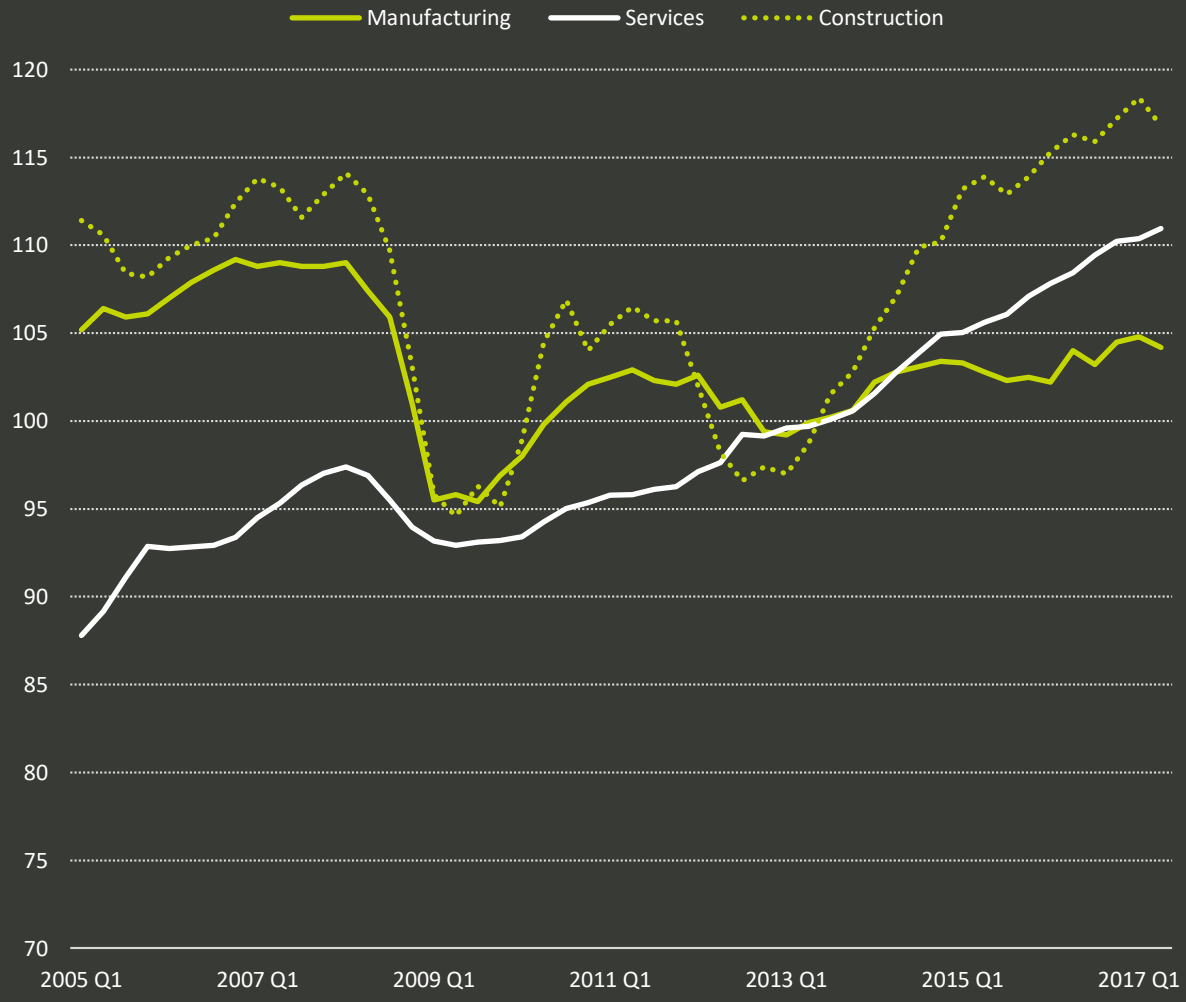


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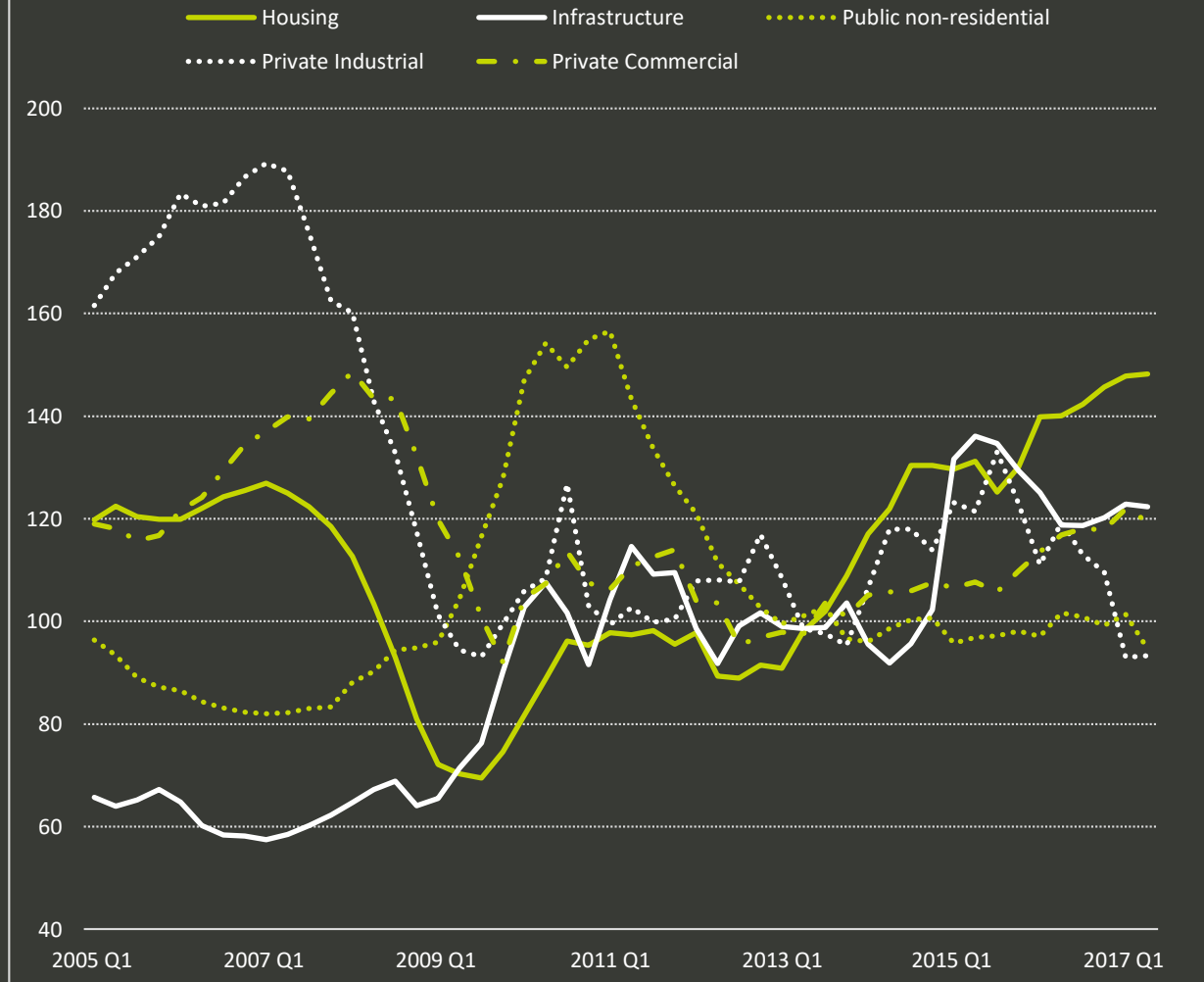
UK Output Data Construction Sector

Industry Output (CVM, SA)



Source: ONS Index of Production; Index of Services; Output in the Construction Industry

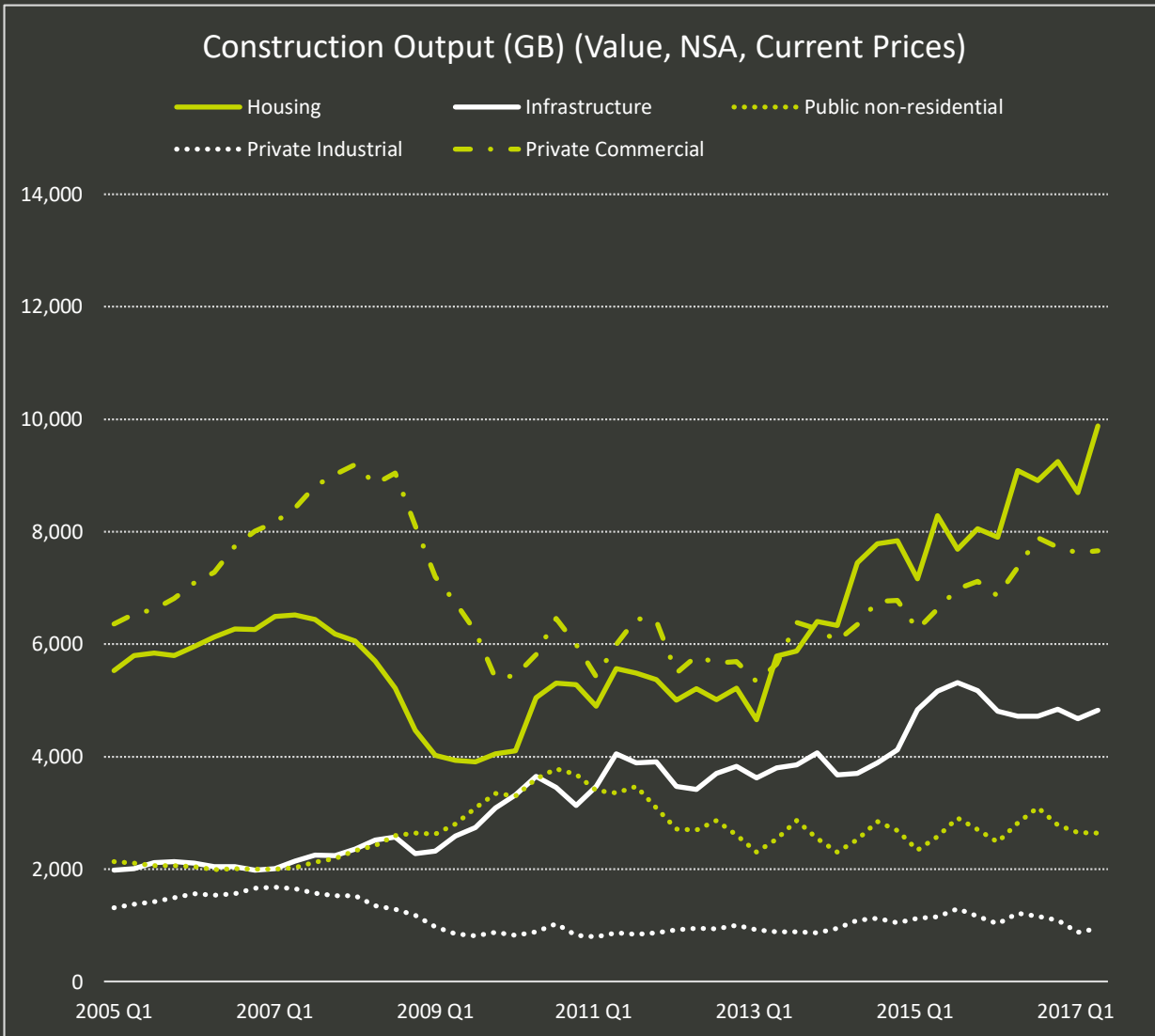
Construction Output (GB) (Volume, SA)



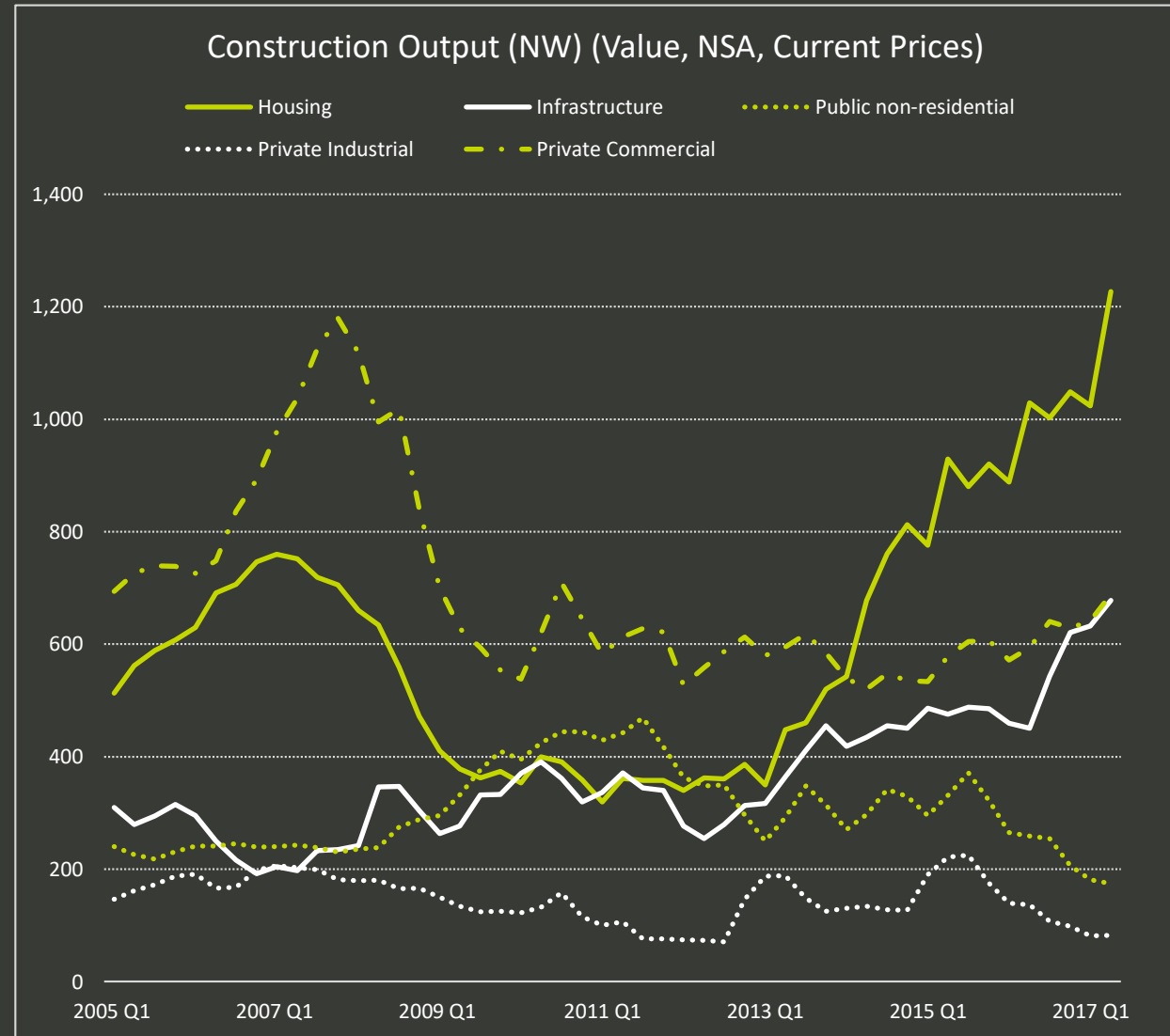
Source: ONS Output in the Construction Industry



UK Output Data **Construction Sector**



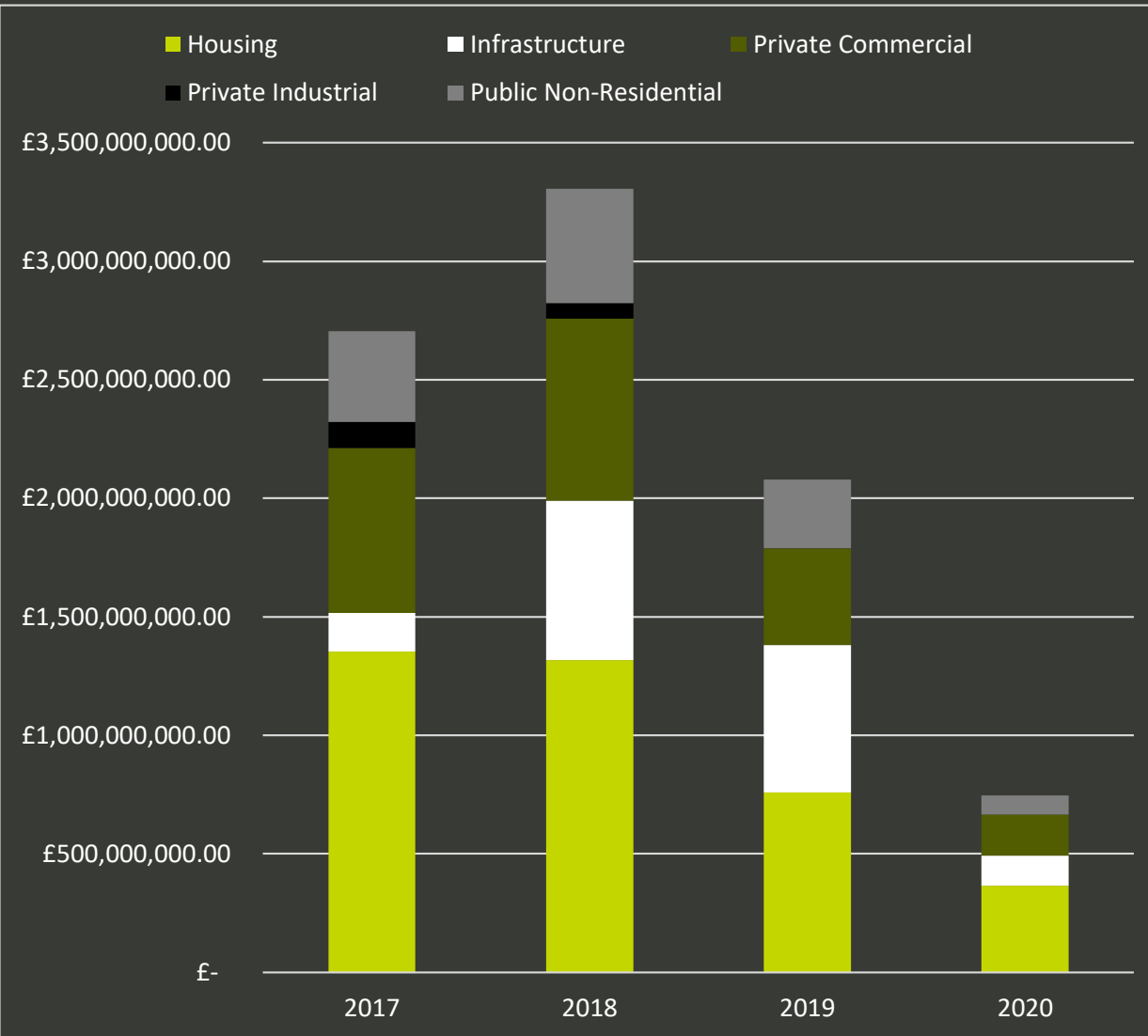
Source: ONS Output in the Construction Industry



Source: ONS Output in the Construction Industry



Output by Sector



Source: GM & CITB GM Construction Pipeline 2017

- Total output 2017-2020: **£8.8bn**
- 42% (**£3.79bn**) of forecasted output is in housing
 - Private Commercial: 23% (£2bn)
 - Infrastructure: 18% (£1.6bn)
 - Public Non-Resi: 14% (£1.2bn)
 - Private Industrial: 3% (£176m)



Gap Analysis

Occupation	Greater Manchester Employment	2018 demand as a % of 2016 employment
Senior, executive, and business process managers	6,760	108%
Construction Project Managers	1,800	100%
Other construction process managers	8,570	88%
Construction Trades Supervisors	1,780	95%
Civil engineers	1,790	98%
Other construction professionals and technical staff	8,420	93%
Surveyors	2,380	125%
Architects	1,490	133%
Wood trades and interior fit-out	10,540	110%
Bricklayers	2,920	140%
Building envelope specialists	3,440	148%
Painters and decorators	4,500	118%
Plasterers	2,130	109%
Roofers	2,380	88%
Floorers	1,300	98%
Glaziers	1,180	123%
Specialist building operatives nec*	2,350	104%
Scaffolders	1,260	79%
Plant operatives	1,910	79%
Plant mechanics/fitters	2,070	77%
Steel erectors/structural fabrication	1,040	101%
Labourers nec*	5,850	95%
Electrical trades and installation	8,510	95%
Plumbing and HVAC Trades	7,610	102%
Logistics	1,000	81%
Civil engineering operatives nec*	520	107%
Non-construction professional, technical, IT, and other office-based staff	14,470	102%
Non-construction operatives	1,700	77%
Total	109,670	103%

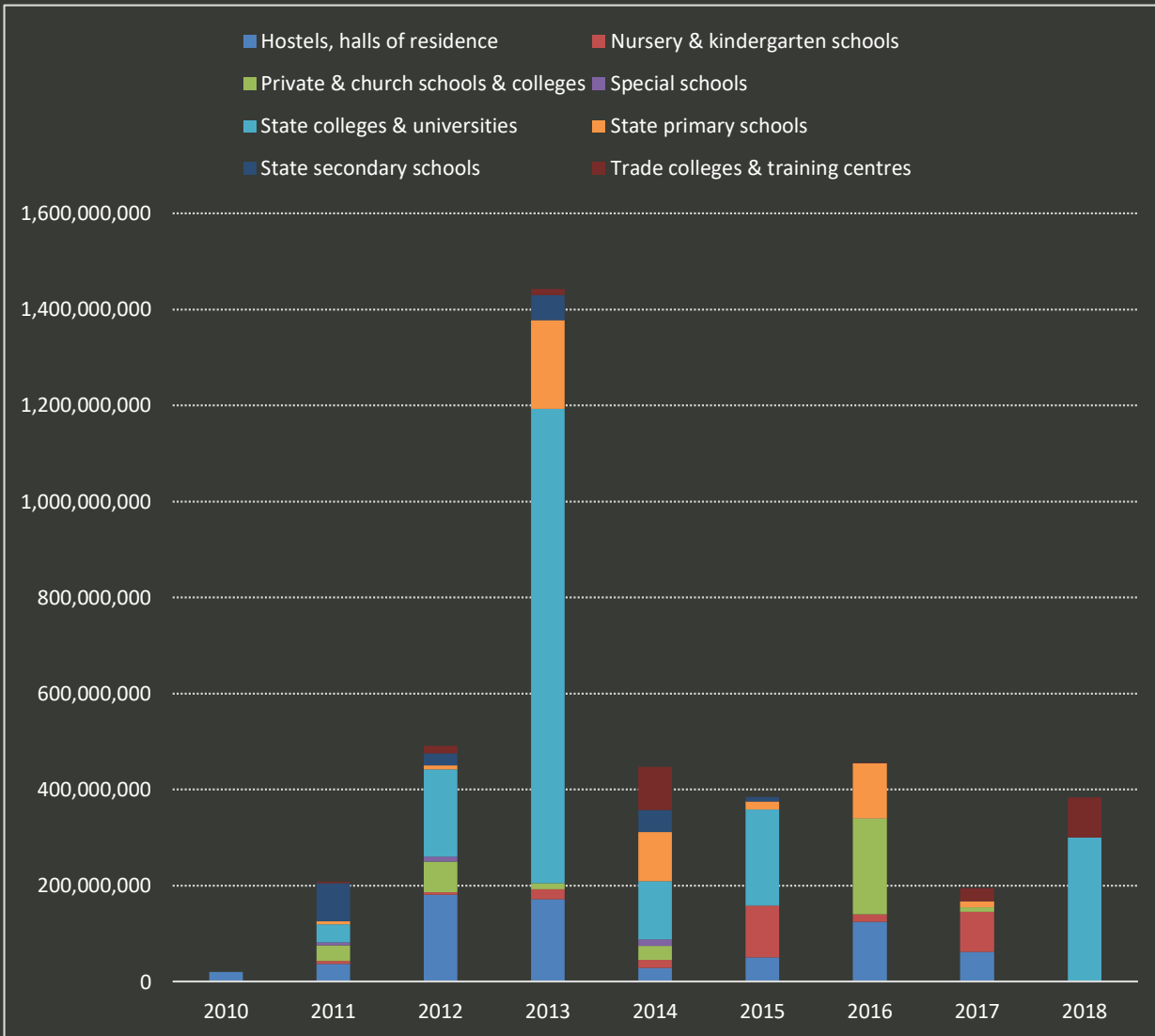
Occupational breakdown of demand for Greater Manchester compared to current employment (Source CITB/WLC)

Occupation	Greater Manchester Employment	Greater Manchester ARR	ARR as a % of 2016 employment
Senior, executive, and business process managers	6,760	20	0.3%
Construction Project Managers	1,800	-	-
Other construction process managers	8,570	80	0.9%
Construction Trades Supervisors	1,780	48	2.7%
Civil engineers	1,790	<20	-
Other construction professionals and technical staff	8,420	28	0.3%
Surveyors	2,380	-	-
Architects	1,490	44	3.0%
Wood trades and interior fit-out	10,540	276	2.6%
Bricklayers	2,920	152	5.2%
Building envelope specialists	3,440	44	1.3%
Painters and decorators	4,500	72	1.6%
Plasterers	2,130	104	4.9%
Roofers	2,380	36	1.5%
Floorers	1,300	<20	-
Glaziers	1,180	32	2.7%
Specialist building operatives nec*	2,350	-	-
Scaffolders	1,260	-	-
Plant operatives	1,910	76	4.0%
Plant mechanics/fitters	2,070	44	2.1%
Steel erectors/structural fabrication	1,040	24	2.3%
Labourers nec*	5,850	164	2.8%
Electrical trades and installation	8,510	260	3.1%
Plumbing and HVAC Trades	7,610	224	2.9%
Logistics	1,000	56	5.6%
Civil engineering operatives nec*	520	28	5.4%
Non-construction prof., tech., IT, and other office-based staff	14,470	220	1.5%
Total	107,970	2,060	1.80%

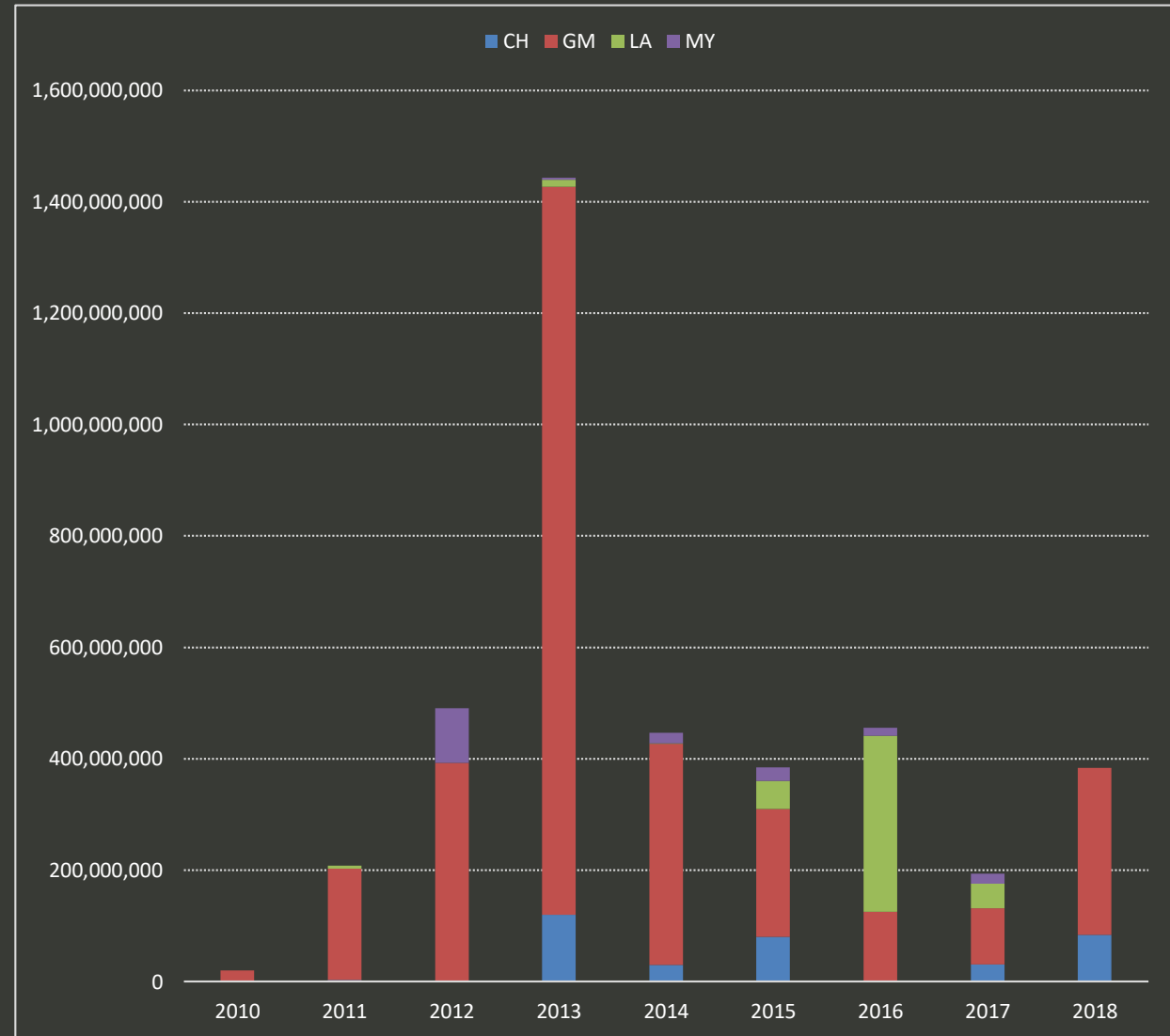
Occupational breakdown of ARR for Greater Manchester (Source CITB)



NW Pipeline (project starts) Education Sector



Source: Barbour ABI; GMCC analysis



Source: Barbour ABI; GMCC analysis



Opportunities & Challenges

Opportunities

- Greater focus on skills needs
- Increased devolution
- Competition driving estate regen.
- Still legacy estates needing refurb.
- Area-based review
- Industry 4.0

Challenges

- Fiscal consolidation policy continues
- Funding to FE & HE uncertain
- Levels of borrowing high
- Some issues around recent quality
- Area-based review
- Industry 4.0





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